



POLARIS CIRCULATION NOTES & BLOCKS

Notes include blocks on patron records in Polaris. They are located in Patron Status area of circulation.

Check Out - 625798 - Polaris

Patron barcode: 21181012341234 Name: Donna Noble Find

Acct charges: \$0.00 Patron code: Adult
Acct credit: \$0.00 Birth date: 10/14/1980
Items out: 0 Phone 1: 801-555-5555
Total overdue: 0 Expiration date: 10/14/2112
Claims/Lost: 0/0 Registered branch: West Jordan Library
Items held: 0 Parent/Guardian:
Total holds/ILL: 0

Patron Blocks

Patron is blocked. Do you want to continue with this operation?

Donna Noble

Block:

Patron has notes

Patron has unread messages

Yes No Patron Status Patron Registration Help

First Encounter with Notes & Blocks

When a patron is first pulled up in Check Out there may be a Note Box that will require action before proceeding to the Check Out screen.

Select **Yes** to continue to checkout. All information related to Notes and Blocks is available from the Check Out screen.


Alternately, select **Patron Status** to go directly to the General Patron screen with blocks and notes access or **Patron Registration** to go directly to address, phone and other patron information.

Patron Status Window

Once in the Patron Status screen there will be separate block and Notice fields.

Blocks here replicate what is shown in the Patron Blocks at login. Items added here are hard blocks which prevent checkout and will be limited in use.

The Notice box will reflect system generated notices and cannot be added to manually.

Almost all notes and blocks will be placed by clicking on the notepad icon  located at the bottom of left status bar.

The note pad changes colors depending on whether there are notes. It is green when there are none, yellow when there are non-blocking notes and red when blocks to card use are on the record.

Patron Status - 625798 - General - Polaris

Barcode: 21181012341234 Name: Donna Noble

Acct charges: \$0.00 Patron code: Adult
Acct credit: \$0.00 Birth date: 10/14/1980
Items out: 0 Phone 1: 801-555-5555
Total overdue: 0 Expiration date: 10/14/2112
Claims/Lost: 0/0 Registered branch: West Jordan Library
Items held: 0 Parent/Guardian:
Total holds/ILL: 0/0 Registration date:

Block:

Patron has notes

Patron has unread messages

Notice:

Title Type

Add Modify Delete

For Help, press F1

Notes & Blocks Window in Patron Status

Accessed by clicking on the  in the General screen of Patron Status, there are three options for Notes. These are Non-Blocking, Blocking and Messages.

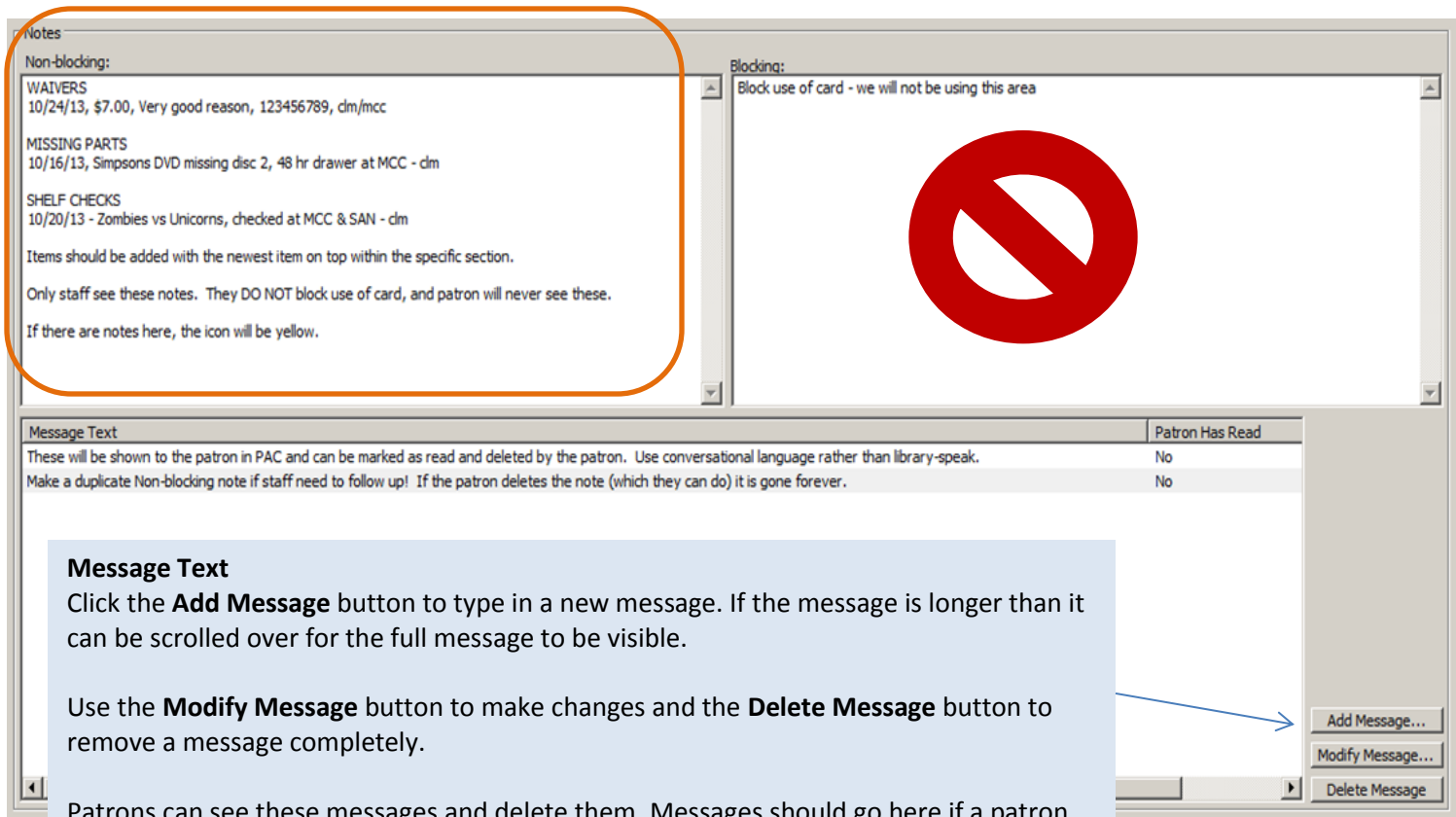
Non-Blocking Notes

The main area we will be using to maintain a record of actions on an account.

- Click in the box directly under the specific heading and type in the information required for the specific action, waiver, missing part, etc...
- Follow standardized process for Waivers and Missing Parts in the Non-blocking box
 - **Waivers**
 - date, amount, reason, ticket number, branch, initials
 - **Missing Parts**
 - date, reason (Friends DVD missing disc 2), on 48 hrs. shelf at "Branch", initials
 - **Shelf Check**
 - date, item, looked for, where, initials
- If a heading (WAIVER, MISSING PARTS) does not exist add one.
- Waivers should be on top, then Missing Parts, Shelf Checks, and so forth. The newest items added to an area should be at the top of the section.

Blocking Notes

This area will block a patrons from using there card. We will not be using this area.



Notes

Non-blocking:

WAIVERS
10/24/13, \$7.00, Very good reason, 123456789, dm/mcc

MISSING PARTS
10/16/13, Simpsons DVD missing disc 2, 48 hr drawer at MCC - dm

SHELF CHECKS
10/20/13 - Zombies vs Unicorns, checked at MCC & SAN - dm

Items should be added with the newest item on top within the specific section.

Only staff see these notes. They DO NOT block use of card, and patron will never see these.

If there are notes here, the icon will be yellow.

Blocking:

Block use of card - we will not be using this area

Message Text

Message Text	Patron Has Read
These will be shown to the patron in PAC and can be marked as read and deleted by the patron. Use conversational language rather than library-speak.	No
Make a duplicate Non-blocking note if staff need to follow up! If the patron deletes the note (which they can do) it is gone forever.	No

Message Text

Click the **Add Message** button to type in a new message. If the message is longer than it can be scrolled over for the full message to be visible.

Use the **Modify Message** button to make changes and the **Delete Message** button to remove a message completely.

Patrons can see these messages and delete them. Messages should go here if a patron cannot be contacted by phone, email or text to notify for missing parts, cards left at a branch, etc... Include a duplicate message in the Non-blocking area as well if follow up is needed by staff.

Add Message...
Modify Message...
Delete Message